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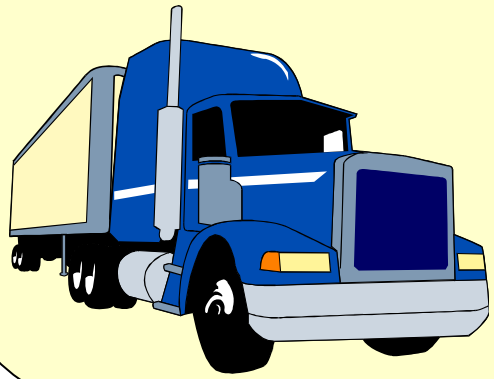
U.S. Army Tank-automotive and Armaments Command

Best Value Acquisition Using Source Selection Trade-Off Procedures

An SSEB Introduction to the Process



Source Selection Information- See FAR 3.104

Robert Spitzbarth
Acquisition Process Management
AMSTA-AQ-AM

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DEFINITION OF THE SOURCE SELECTION TRADE-OFF PROCESS

- A Process
- Used in Competitive Negotiated Contracting
- Selects Most Advantageous Offer
- Evaluates and Compares Factors in Addition to Cost or Price

Evaluation Documentation

- WHAT ARE YOU ALL HERE FOR: Execute and Document and Evaluation. All other Actions (Reading Proposal, Writing IFDs, etc.) are Preliminary Activities to the Evaluation
- Evaluations Reflect the Best Judgment of the Evaluator - GAO Will Not Supplant its Own Technical Judgment for that of the Agency.
- GAO Standard: Is the Evaluation Conclusion Reasonably and Rationally Supported
- While we Evaluate Proposals to a Standard, Variances in Offerors Ratings/Scores Must be Reasonably/Rationally Substantiated in Evaluation Write-Ups.
- When Making an Assessment Judgment - Always Answer the Question "Why" in Terms of Substantiation to the Conclusion
- Remember: The Offeror will see Evaluation Analysis

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PERFORMANCE RISK vs. PROPOSAL

- **Performance Risk vs. Proposal Risk**
  - **Performance Risk: Risks Associated with an Offeror's Likelihood of Success in Performing the Solicitation's Requirements as Indicated by that Offeror's Record of Current or Past Performance**
  - **Proposal Risk: Risks Associated with the Offeror's Proposed Approach in Meeting the Requirements of the Solicitation.**

Schedule

Release Request for Proposal (RFP)	May 04, 01
Receive Capability Information	Jun 04, 01
Receive Offers, Begin Evaluations	Jun 02, 01
Initial SSA Briefing	Jun 06, 01
Initial Written Evaluations	Jul 20, 01
SSA Brief	Jul 23, 02
Negotiations/Discussions	Jul 24-Aug 20, 01
Meaningful Discussions Complete/ Model Contracts Reviewed	Aug 21, 01
Interim Evaluations Complete	Aug 23, 01
Informal SSA Brief	Aug 27, 01
Call for Final Proposal Revisions	Aug 28, 01
Receive FPRs	Sep 04, 01
Final Evaluations Complete	Sep 07, 01

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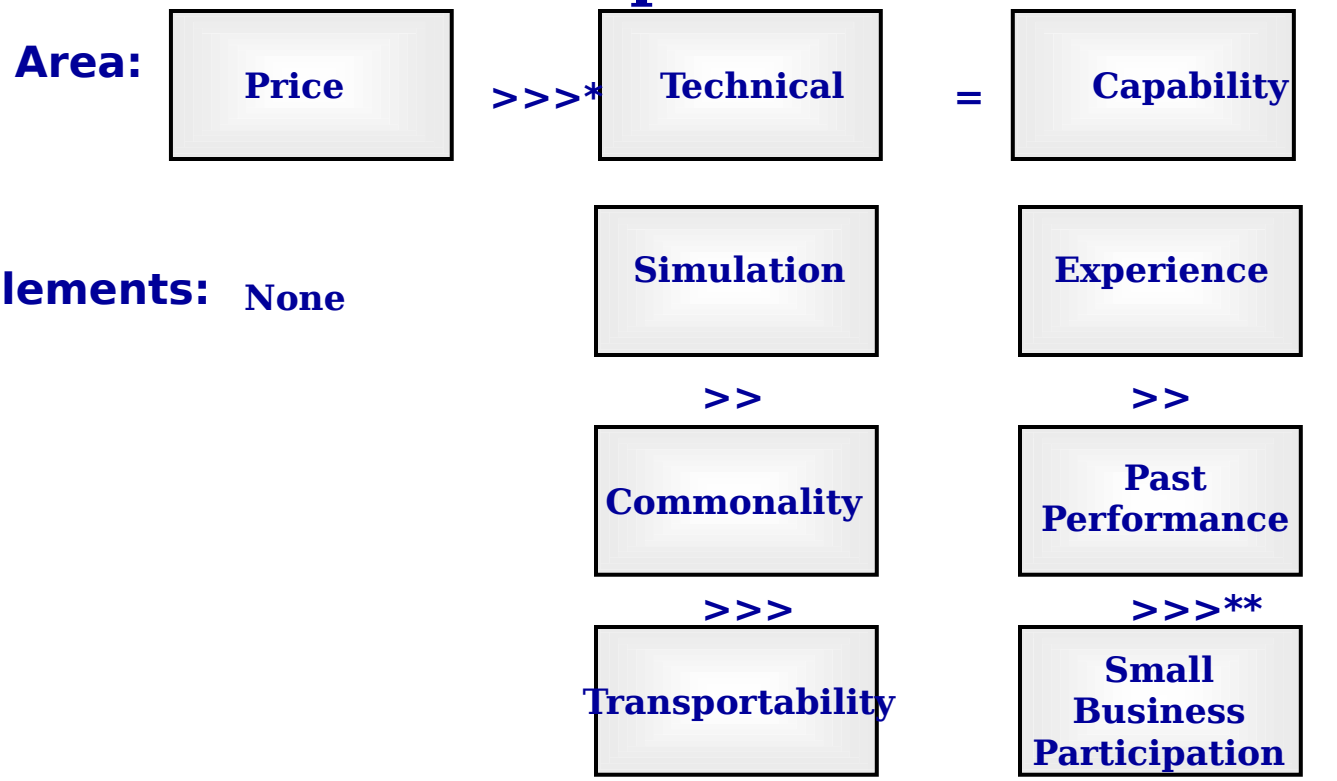
M900 Series Trailer Evaluation Criteria - Relative Order of Importance



*Technical & Capability Combined "are about equal to Price"

** "much more important"

Legend

>>> Significantly More Important

>> More Important

> Slightly More Important

= Approximately Equal

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EVALUATION GUIDANCE

- The Evaluation Must Follow The RFP And The Source Sel
- Proposals Are Evaluated Against The RFP, Not Each Othe
- Alternatives in the Proposal Must be Surfaced and Resolv
  The Offeror Must Choose His Own Approach;
- Only What Is Offered and Priced Will Be Evaluated, Not T
  That “Could Be Provided” Or Are “Also Available.”
- Errors, Omissions, Needed Clarifications Must Be Identifi
  Offerors If They Are Necessary To Understand What Is Be
  Offered and To Draw A Conclusion;
- Deficiencies and Significant Weaknesses Must Be Disclos
  The Offeror Given A Chance To Correct.

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Evaluation Worksheet Completion Instructions

- Source Selection Plan Includes Evaluation Worksheet Document
- Evaluation Form has 2 Basic Sections:
  - Top Portion - General Instructions - Offeror, Area, Element, Factor, RFP Paragraphs, References, Numerical Score/Adjectival Rating
  - Bottom Portion - Supporting Narrative/Advantages and Disadvantages
    - Supporting Narrative - 3 Sections in Each Evaluation
    - Section 1: What was Proposed?
    - Section 2: What is our Assessment of Proposal?
    - Section 3: Application of Rating (Standard Language)
  - Advantages/Disadvantages
    - Significant Advantages - This Area will Detail any Characteristic Resulting in either a Meaningful Reduction in the Risk or not Meeting the Contractual Requirements
    - Significant Disadvantages - This Area will Detail any Characteristic of the Offeror's Proposal which may Result in a Meaningful Increase in the Risk of AGT Meeting Contractual Requirements

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SOURCE SELECTION INFORMATION/SEE FAR 3.104

ATTACHMENT 2 - EVALUATION WORKSHEET

Control Number: _____
Offeror: _____
Area: _____
Element: _____
Solicitation and/or Specific Paragraph: _____
References: (IFDs issued; proposal vol/para/page; test report or manual used, etc.)

Adjectival Rating (indicate type; e.g. initial or final): _____

Supporting Narrative:

This area will describe 1)the relevant proposal material; 2)the Government's assessment with respect to the relevant evaluation criteria; and 3)the assessment conclusion and rating. Narrative must explain why the rating is appropriate.

Significant Advantages:

This area will describe any characteristics of the offeror's proposal that will result in a meaningful reduction in the risk of not meeting the contractual requirements.

Significant Disadvantages:

This area will detail any characteristics of the offeror's proposal which may result in a meaningful increase in the risk of not meeting the contractual requirements.

Evaluator: _____ Date: _____
Area Chief: _____ Date: _____
Evaluation Manager: _____ Date: _____
PCO: _____ Date: _____
Counsel: _____ Date: _____

Initial vs. Final Evaluations

- **Ensure Initial Evaluations are Complete Prior to Requesting Final Proposal Revisions.**

- **Reconcile Disadvantages & Deficiencies Against Discussion Record**

- **Amend Initial Evaluations to Reflect Final Proposal Revision Changes.**

- **Final Evaluations Must Reflect Evaluation of Final Proposal Revision Changes - Including Rationale for Changing or Not Changing Rating!!**

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Items for Discussion (IFDs)

- **SSEB Will Evaluate Information Requested in Section L of the RFP**
- **Requests for Additional Information (IFDs) Should be Limited to the**

  Minimum Data Necessary to Understand What is Proposed, and to

  Effectively Evaluate it.
- **IFDs WILL be Issued on Deficiencies/Significant Weaknesses**
  - **IFDs Must Provide Offerors With Sufficient Information to Develop a**

    Meaningful Response
    - **Cite RFP/Proposal References**
    - **What is the Requirement?**
    - **What is Stated in the Proposal?**

ATTACHMENT 4
ITEMS FOR CLARIFICATION/COMMUNICATION/DISCUSSION
SOLICITATION NO. DAAE07-01-R-S050

CONTROL NO._____
OFFEROR – Date:

AREA/ELEMENT:

1. Reason for Request:

( ) Deficiency – A deficiency is defined as a material failure to meet a stated requirement or combination of significant weaknesses that increases the risk of unsuccessful contract performance to an unacceptable level. Failure to correct a deficiency may preclude an offeror from award.
( ) Significant Weakness -- A flaw that appreciably increases the risk of unsuccessful contract performance.
( ) Unclear – needs clarification.
( ) Incomplete – lacks information requested in RFP.
( ) Unsupported – lacks specifics.
( ) Inconsistent – contradictions among its parts.
( ) In error – appears to be a mistake; e.g., typo, miscalculation.
( ) Other (Explain).

2. Specific (page and paragraph number) relevant RFP reference:

3. Specific reference in proposal:

4. Information required from offeror:

5. Offeror's response:

_____
Evaluator Date

_____
Evaluation Manager Date

_____
Legal Advisor Date

_____
PCO Date

CONDUCTING DISCUSSIONS

- The Primary Purpose of Discussions Should Be to
  - Ensure the Government Gets the Best Product or Service

- Asking Questions Does not Constitute Meaningful Discussions!!!

- The Offeror Must Have Sufficient Information to
  - Understand the Government's Concern

- Oral Discussions Greatly Enhance Communication,
  - Improve Quality, Save Time, and

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